

Active Ageing through Social Partnership and Industrial Relations in Europe European Union Preceding Projects Summary Report

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European policy context – active ageing and social dialogue

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1. Evolution of active ageing in European policy

Most developed countries are experiencing significant challenges of population ageing – an issue which has for long been a concern to the European Union (High Level Group chaired by Wim Kok, 2004). On the one hand, the European working-age population has started to shrink, while on the other, the over-60 population is growing by about two million people a year (Bijak, Kupiszewska, Kupiszewski, Saczuk, & Kicingier, 2007). These pressures are increasing as the ‘baby-boomer’ generation moves into retirement - a situation which presents challenges for sustainable public finances, in particular, the financing of health care and pensions. The ageing of societies could weaken the solidarity between generations, particularly if economies are unable to provide full employment and if younger and older people are seen as “competing” for life opportunities and jobs. (Spengler), (Minkler, 1986; Walker, 1990)

Against this policy background, in September 2010 the European Commission decided that the year 2012 should be designated as the ‘European Year for Active Ageing’. This in a very real sense was the precursor of our project, *ASPIRE – Active Ageing through Social Partnership and Industrial Relations in Europe*. The idea of *active ageing* has been explored through numerous EU funded projects, resulting in insights on how we may best maintain activity across multiple dimensions of human existence as societies and individuals age. There were literally hundreds of separate initiatives in the European Year of Active Ageing and Solidarity Between Generations (EY2012), including conferences organised by the European Commission (Tymowski, 2015), projects which engaged a large number of EU member states and research outputs that will continue to stimulate still more policy debate and yet more research in future. In these ways and through the widespread dissemination of ideas informally and through the media, the value of active ageing and the need for solidarity between the generations have been promoted. Devising and putting measures into place to promote active ageing in workplaces and communities through active discourse between social partners, remains a major goal of European policy and captures, briefly, the essence of the ASPIRE project.

2. Research and social dialogue projects relevant to active ageing

a. MOPACT

Several research and partnership projects launched in 2012 have left a legacy on which it is possible to draw. For example, the MOPACT project¹, (Mobilising the Potential for Active Ageing in Europe)

¹ <http://mopact.group.shef.ac.uk/>

comprises a multi-disciplinary team of 29 partners in 13 European countries, working over nine research themes in a four-year project period 2014-2017. The research themes comprise; *'Active and Healthy Ageing as an Asset,' 'Economic Consequences of Ageing,' 'Extending Working Lives,' 'Biogerontology,' 'Enhancing Active Citizenship,' 'Built and Technical Environment,' 'Creation of a European Active Ageing Resource,' 'Health and Wellbeing,'* and *'Pension Systems, Savings and Financial Investment.'* The project has adopted a strong commitment to stakeholder engagement and delivery of research across a broad field encompassing all the strands of “the active ageing agenda.”

b. EIP on AHA

The European Innovation Partnership on Active and Healthy Ageing (EIP on AHA)² was launched in 2011, aiming, as its name suggests, to promote the goals of active and healthy ageing through pilot innovations, mostly at local or regional level. The project's strategic plan focuses mainly on activities such as encouraging independent living and the social inclusion of older people. Nevertheless, it identified innovative practices of benefit to work age people including the Lombardy Workplace Health Promotion Programme, which has a strong regional focus for health protection and improvements at work. The Lombardy project's leaders claim that its main objectives were firstly, the promotion of organizational changes in the workplace in order to provide accessible working and secondly, support for adoption of healthy lifestyles which would help in prevention of chronic diseases. Improving work organization and environment were seen to have an impact on active and healthy ageing, whilst also supporting older workers and those with chronic diseases or disabilities, to remain in the workplace (EC, 2016).

c. Work Age

In Work Age, a project supported by the European Union Programme for Employment and Social Solidarity - PROGRESS (2007-2013), researchers worked with employers and employees in workshops, adopting a consultancy approach. The research sought to test the hypothesis that targeted interventions to improve job design and work organisation could have an impact on workers' future plans in relation to work and retirement. It postulated that sustainable work and workplaces would become possible when 'innovative' changes had been introduced, such innovations being generated through a process of discussion facilitated by the project. Researchers worked directly with managers and employees in an intensive series of workshops, supported by hands-on consultancy style interviews and surveys. In this way they encouraged workers and managers in two public sector organisations (one a local authority the other a National Health Service maternity trust) to share their views and feelings in situations where entrenched ways of working were contributing to older workers exiting the workforce early. The project was supported by a steering group including employer representatives and representatives of the unions and the TUC as well as various other stakeholders including TAEN – The Age and Employment Network, ACAS, the Department for Work and

² https://ec.europa.eu/eip/ageing/home_en

Pensions, the Involvement and Participation Association and a number of experts in health and work. The project demonstrated that changes, introduced through engagement with employees at all levels in the organisation, could indeed break down barriers and benefit the organisation through streamlined methods making efficiencies possible. This in turn, it was argued, could lead to higher productivity as well as more job satisfaction for the worker, influencing plans regarding retirement or continued employment. (Baguley, 2016) The project was specifically directed at the goal of *extending working lives* (as opposed to *active ageing*) and while the active ageing agenda is broader, Work Age is clearly a useful example on which to draw, noting in particular its use of what could be seen as a novel form of supported social dialogue.

d. Other research

Through EY2012 and EU programmes immediately following it, more developments occurred that should widen understanding and provide more conceptual tools to support discourse around active ageing. An Active Ageing Index (Zaidi et al., 2013) has been developed to provide a framework within which to cast policy reforms and evaluate progress. A *Covenant on Demographic Change* (Zaidi et al., 2013) has been launched to bring together local and regional authorities and other stakeholders in order to support active and healthy ageing and develop age-friendly environments.

3. Meaning of active ageing

Despite all the foregoing work, there remains a danger that European countries may not all be “singing from the same hymn sheet” on active ageing. The World Health Organisation formula provides a useful point of reference to establish common ground; “Active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age.” (WHO, 2002; World Health Organization, 2002). This has been interpreted by Alan Walker (2012) as referring to a “A comprehensive strategy to maximise participation and well-being as people age (which) should operate simultaneously at the individual (lifestyle), organizational (management) and societal (policy) levels at all stages of the life course”.

The writers of a MOPACT project paper on active ageing and extending working lives point out, “no general definition of ‘active ageing’ can be found... the term is of different relevance in different countries.” While in Poland discussion of active ageing started relatively late, in the Netherlands and Germany, at least initially it was understood as referring mostly to labour market participation. In Italy, in contrast, policies to support active ageing were mainly focused on pension reforms to extend working lives and in Denmark a broader understanding of active ageing embracing third age career activities has begun to emerge (Naegel & Bauknecht, 2013).

4. Social dialogue as an instrument of change

In the belief that independent employers' and employees' organisations can assist and collaborate in the achievement of outcomes furthering the economic and social agendas of Europe, the EU, through its Directorate General for Employment Social Affairs and Equal Opportunities, has encouraged social dialogue. The concept of social dialogue put forward by the European Commission embraces different forms of discussions, consultations, negotiations and joint actions representing the two sides of industry and sometimes public authorities. One form of social dialogue is through the cross industry sectoral committees and social dialogue committees established by the EU, but other forms include country level, regional, local or workplace discussions. It is obvious therefore that much of the activity that continues daily as part of the normal industrial relations and problem-solving activity in organisations, can be described as "social dialogue." Social dialogue has provided a route to progress in fields such as the elimination of discrimination and promotion of worker equality, promotion and protection of health, safety and well-being, protection against unemployment, the support of vulnerable workers and in many other spheres. There is little new in the idea of employees being consulted, but properly used, social dialogue can do more than simply exchange information. It can produce joint recommendations, generate guidelines and good practice examples and lead to recommendations and opinions that may influence all of the actors in the social dialogue process as well as national and European institutions. Outcomes of social dialogue discussions can be seen in autonomous action by one side or the other and can be expressed in the form of binding agreements that may in due course have the force of legislation. Since the initiative to foster social dialogue was launched in 1985 by the then President Jacques Delors, the process has been seen as crucial to foster competitiveness, fairness, economic prosperity and well-being. It is logical therefore that the same model should be used to explore, inform upon and develop best practices that encourage active ageing.

5. Framework agreement on active ageing

In March 2017, organisations of workers and employers across the EU concluded a significant and ground breaking "framework agreement on active ageing and an intergenerational approach." In order to embrace and drive forward changes to support active ageing, it was felt that the social partners needed to engage with the issues. The new "framework agreement" attempts to support such engagement by laying the basis for constructive discussions on population ageing, including on the impact it will have on people in work. The agreement seeks to establish a framework in which there will be "...increased awareness and understanding of employers, workers and their representatives of the challenges and opportunities deriving from demographic change..." The same framework is put forward as helping to provide workers and employers with practical measures and approaches, "...to manage active ageing in an effective manner." Healthy, safe and productive working environments

and innovative life-cycle approaches to creating productive and quality jobs that will enable people to remain in the workforce until legal retirement age, are all part of the vision offered by the agreement. *Active ageing* is recognised as something that will not simply happen of its own accord, but must be *made* to happen. This aim is to be achieved is through a partnership approach in which discussion and exchanges of different kinds are central. The panel below provides the text of the introductory section of the framework agreement.

EUROPEAN SOCIAL PARTNERS' AUTONOMOUS FRAMEWORK AGREEMENT ON ACTIVE AGEING AND AN INTER-GENERATIONAL APPROACH 8 March 2017

“In response to the challenges deriving from demographic change, the European social partners, Business Europe, UEAPME, CEEP and the ETUC (and the liaison committee EUROCADRES/CEC), agreed in the context of their 2015-2017 Work Programme to negotiate an autonomous framework agreement on active ageing and an inter-generational approach.

The European social partners note that measures need to be implemented, where necessary at national, sectoral and/or company levels, to make it easier for older workers to actively participate and stay in the labour market until the legal retirement age, and at the same time make sure that measures are taken in order to ease inter-generational transitions in the context of high youth unemployment.

Such measures should be aimed at significantly improving the ability of workers of all ages to stay in the labour market, healthy and active until the legal retirement age, as well as strengthening a culture of responsibility, commitment, respect and dignity in all workplaces where all workers are valued as important irrespective of age.

This framework agreement constitutes the contribution of the social partners to the EU policies (including non-discrimination legislation) and actions which have already been developed to support active ageing and the intergenerational approach. This agreement therefore aims to build upon and enhance the existing measures and approaches that are in place in different contexts across Europe. It outlines tools/measures to be taken into account by social partners and/or HR managers in the context of national demographic and labour market realities, and in accordance with national practices and procedures specific to management and labour.

The framework agreement is based on the principle that ensuring active ageing and the intergenerational approach requires a shared commitment on the part of employers, workers and their representatives.

The social partners are aware of the fact that successfully addressing the challenges deriving from demographic change does not depend exclusively on their action. EU and national public authorities and other actors have responsibilities in terms of ensuring that there is a framework which encourages and promotes active ageing and the inter-generational approach.”

Source: European Social Partners autonomous framework agreement on active ageing and an intergenerational approach 8th March 2017, Signed by the European Trade Union Confederation (ETUC), Business Europe, The European Centre of Employers and Enterprises providing Public Services (CEEP), and UEAPME (the employers' organisation representing interests of European crafts, trades and SMEs at EU level).